

Physician Views: Post ADA view on key diabetes market developments

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Abstracts

Last week's American Diabetes Association (ADA) meeting provided further evidence that the diabetes market is likely to be the pharmaceutical industry's most competitive disease area over the next decade.

With regards to oral therapies, positive data for Eli Lilly's dulaglutide has spurred the view among analysts that the GLP-1 agonist market will grow substantially, while players who already market products within this class – Novo Nordisk and AstraZeneca/Bristol-Myers Squibb – will also be looking at ways to accelerate revenue growth.

Similarly, forecasts for the SGLT-2 inhibitor market appear to be steadily moving upwards, driven primarily by a strong uptake for Johnson & Johnson's Invokana.

Previous FirstWord Physician Views polls have indicated that recent FDA concern surrounding the safety of DPP-IV inhibitor products has had a minimal impact on prescribing trends among endocrinologists – a trend that is likely to solidify in light of the FDA indicating that only long term outcome studies can demonstrate if there is a significant pancreatic safety signal.

Attention has thus shifted to outcome studies, but in the short to medium term with regard to the possibility of demonstrating cardiovascular benefit versus placebo. The first of these studies read out two weeks ago – for AstraZeneca and Bristol-Myers Squibb's Onglyza – and demonstrated non-superiority. Whilst this was widely expected, analysts have also expressed some disappointment given that sales growth for the DPP-IV class has slowed in recent months.

In the long acting insulin market, FDA rejection of Novo Nordisk's Tresiba in February was a clear disappointment, although Sanofi looks poised to take advantage via its efforts to extend and enhance its market-leading Lantus franchise. At the ADA meeting, Sanofi released the first Phase III data for its next-generation Lantus programme (known as Lantus U300) designed to provide greater benefit in terms of reducing hypoglycaemic events. Analysts suggest this is the first evidence to realistically demonstrate that continued growth for Lantus past its patent expiry date is feasible.

In light of recent developments, this week's Physician Views poll will ask US-based endocrinologists:

Whether they anticipate data from the SAVOR outcomes study will impact their prescribing habits with regard to AstraZeneca and Bristol-Myers Squibb's Onglyza

To what percentage of GLP-1 patients they would prescribe Eli Lilly's dulaglutide if it was available today

By what percentage they would expect to increase their usage of AstraZeneca and Bristol-Myers Squibb's GLP-1 agonist Bydureon if it was administered in a more convenient pen device?

What the current level of unmet need is for novel longer acting insulins that are able to reduce the rate of hypoglycaemia

Where they believe they are most likely to use SGLT-2 inhibitors within the treatment paradigm

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